

Pursuit of Attention

GETTING TO THE CENTER OF ATTENTIVE AUDIENCES



Why attention?

- Do **REACH** and **FREQUENCY** suffice?
- Look beyond current metrics to drive performance
- How do we know if they are paying attention?
- Explore how the context of the media experience influences levels of **RECEPTIVITY** and **ATTENTION**



RECEPTIVITY

DEFINITION

Willingness to receive a message from a brand before exposure to an ad.

PASSIVE

A STATE OF MIND

Exists prior to and during exposure

How *OPEN* is the consumer to the stimuli (ad)?



ATTENTION

DEFINITION

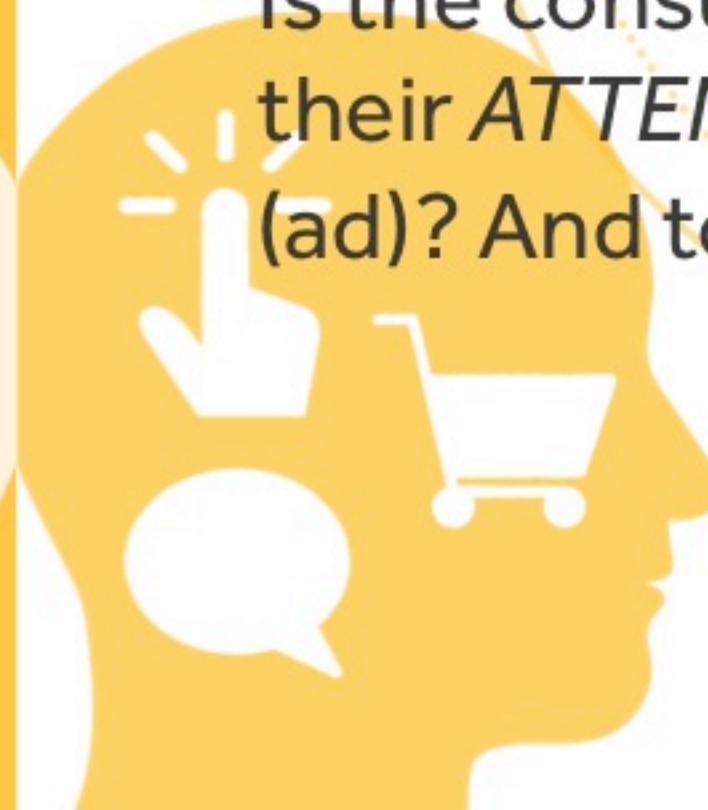
An active behavior of noticing an ad.

ACTIVE

AN ACTION

Exists during exposure only

Is the consumer actively giving their *ATTENTION* to the stimuli (ad)? And to what degree?



OBJECTIVE 1

RECEPTIVITY

Deconstruct the indicators of receptivity

Determine how/if these indicators may differ by industry vertical

Identify appropriate targeting triggers for each indicator



OBJECTIVE 2

ATTENTION

Conduct attention measurement to test output of receptivity

Establish to what degree attention drives brand metrics

Use findings to better understand and define attentive audiences



THE METHODOLOGY

RECEPTIVITY

7,000 Video Viewers from
Representative Online Panel

ATTENTION

3,651 Participants
in an Online Lab Test



Captured a Diary of Video
Viewing Experience –
Who? What? Where?
When? Why? +Receptivity

Determined Targeting
Indicators That Influence
Receptivity

Created 12 Distinct
Scenarios Based on
Combinations of
4 Targeting Indicators

Collected Attention
Metrics and Traditional
Ad Metrics

Receptivity & Attention

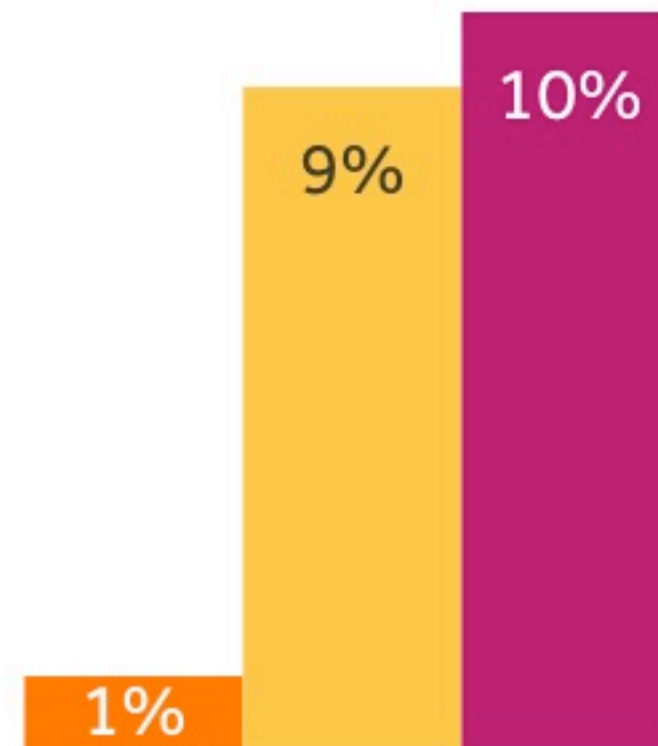
ARE THEY IMPORTANT?



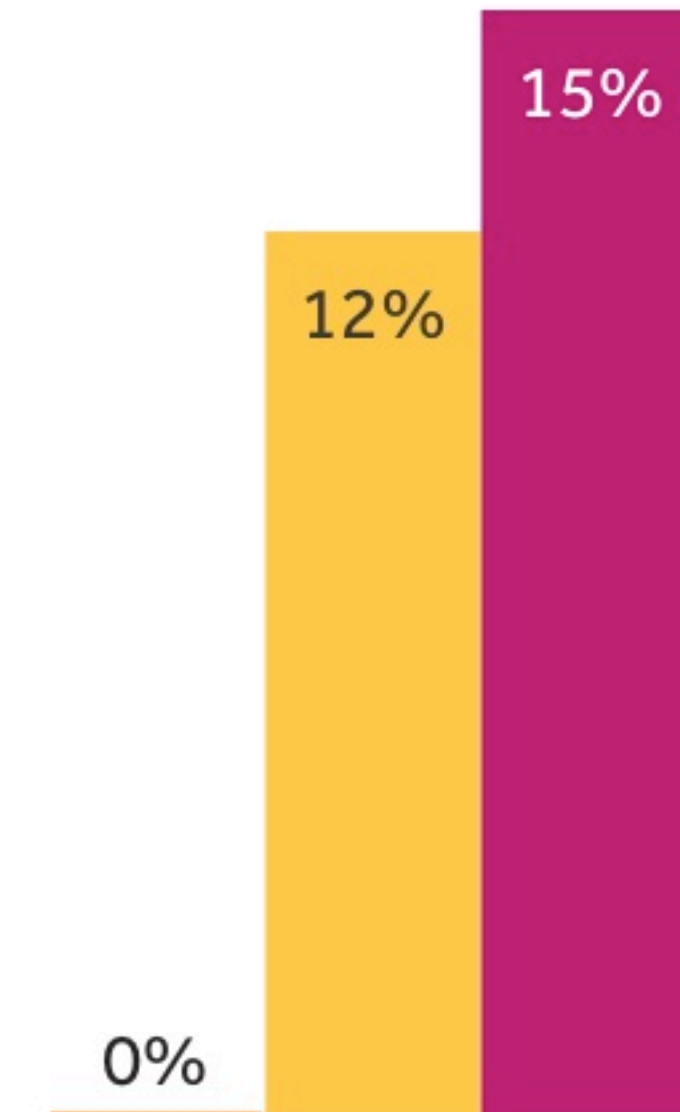
Higher receptivity and attention = higher brand metrics



RECEPTIVITY



ATTENTION



OVERALL BRAND FAVORABILITY

■ LOW ■ MODERATE ■ HIGH

Which indicators influence receptivity?



LOCATION

The context in which a consumer is watching video

MOOD

State of mind of the consumer

CONTENT GENRE

Category of video watched

NEED STATE

Reasons for consuming media

DEVICE

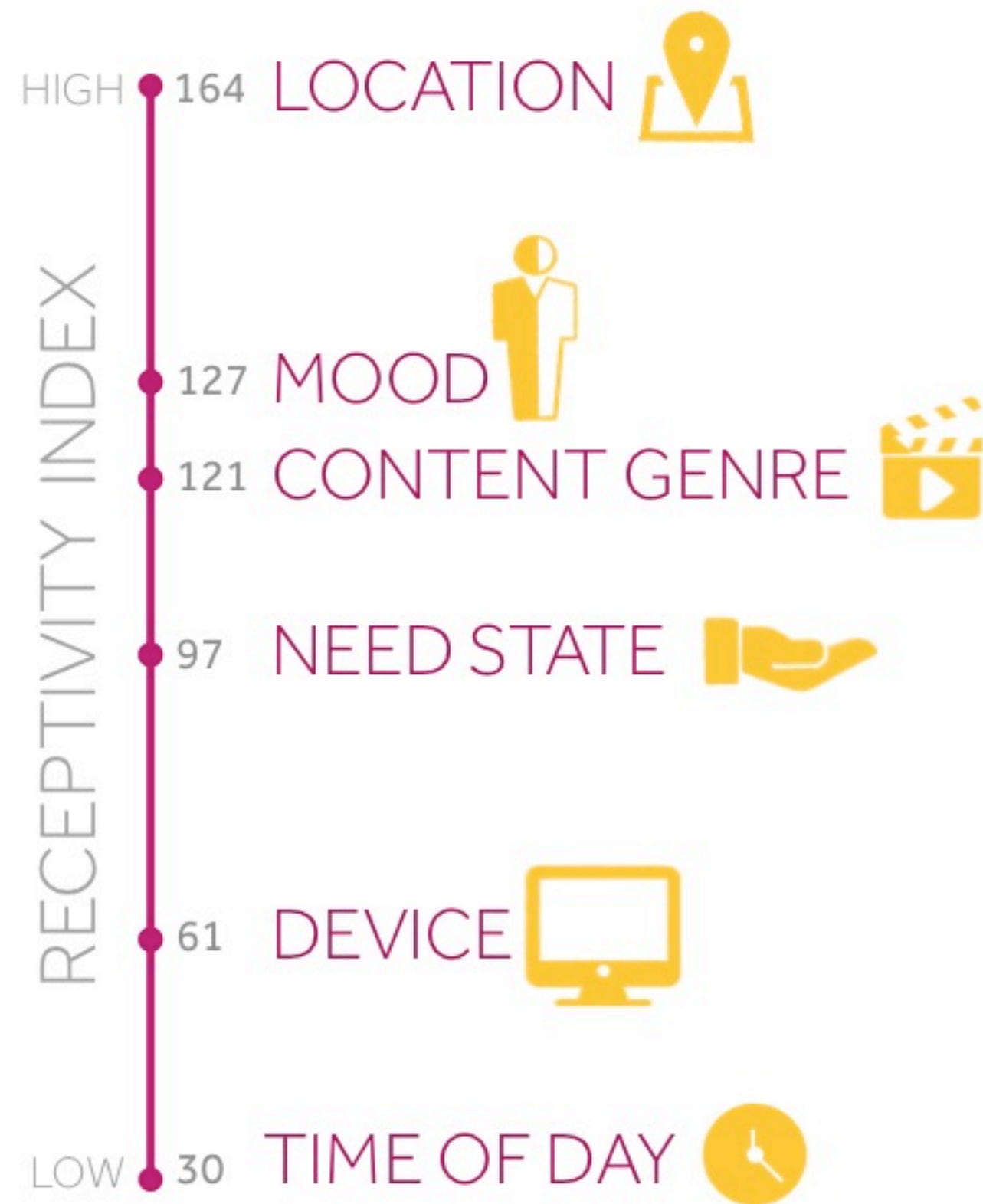
The device they are using to watch video

TIME OF DAY

Time of day video/show was consumed

Each indicator impacts receptivity to a different degree

Average Importance of Indicators



Location ranked highest in influencing receptivity

Being away from home is highly impactful



Indexed Receptivity By Location* (TOTAL SAMPLE)

PUBLIC PLACE

122

SCHOOL OR
WORK

105

HOME

87

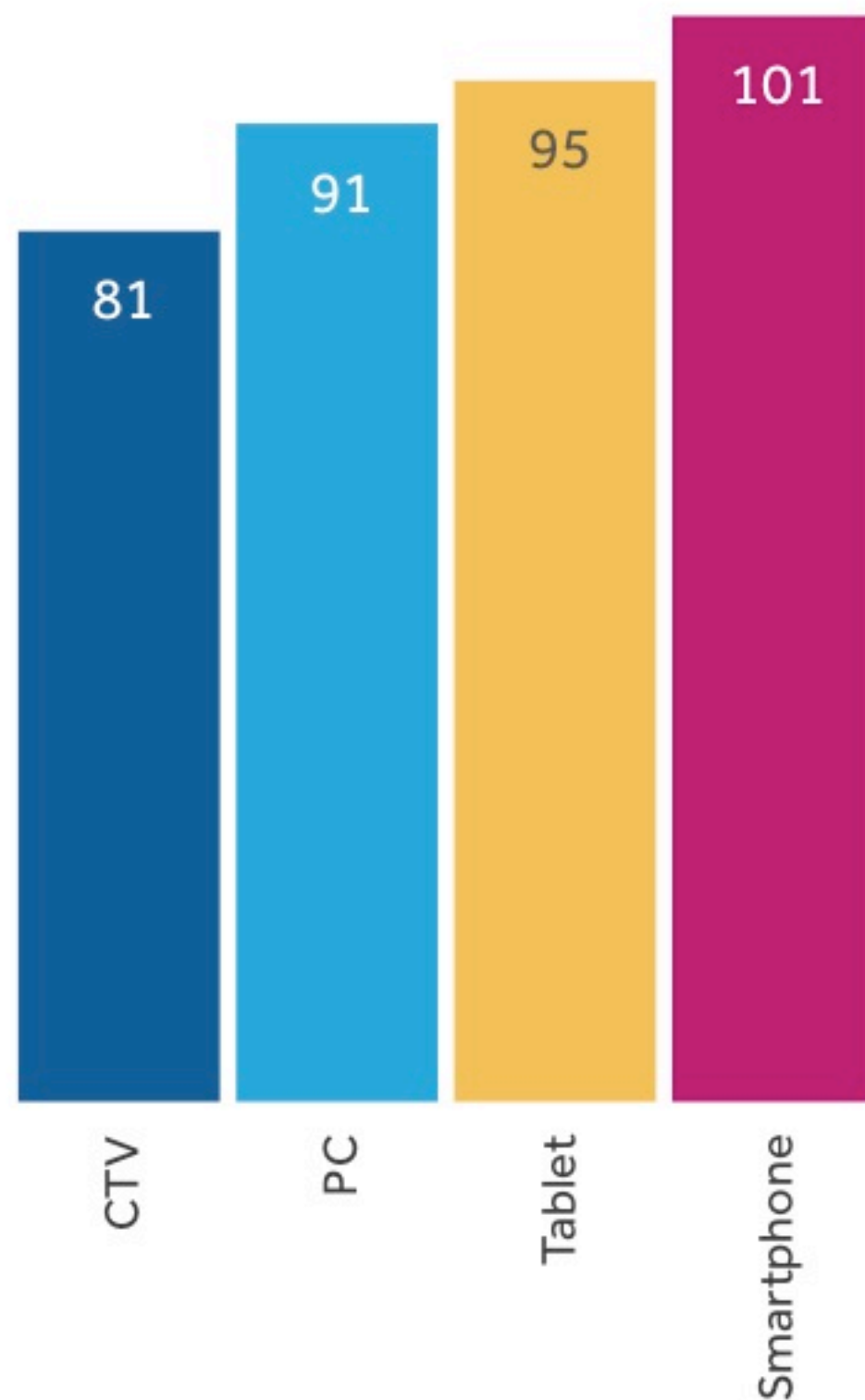
OTHER

66

*"Public place" includes restaurant or bar, store, gym, by the pool, commuting, on vacation. "Other" includes anywhere not listed. Public Place n=525; School or work n=801; Home n=11,630; Other n=575. *Indexed so average importance is 100

Receptivity on the go!

Indexed Receptivity By Device*
(TOTAL SAMPLE)



Consumers most receptive on mobile devices, particularly *smartphone*

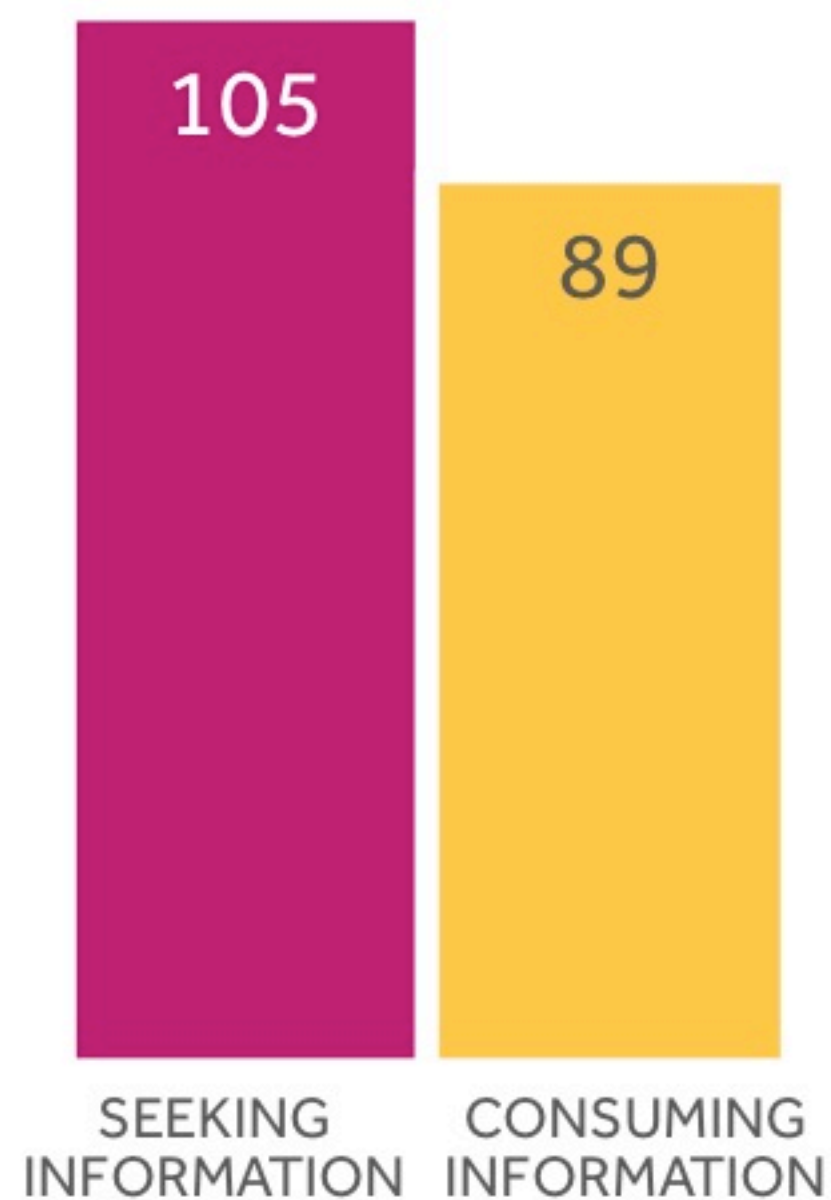


Smartphone n=1,057; Tablet n=1,118; PC n=7,637; CTV n=3,802. *Indexed so average importance is 100

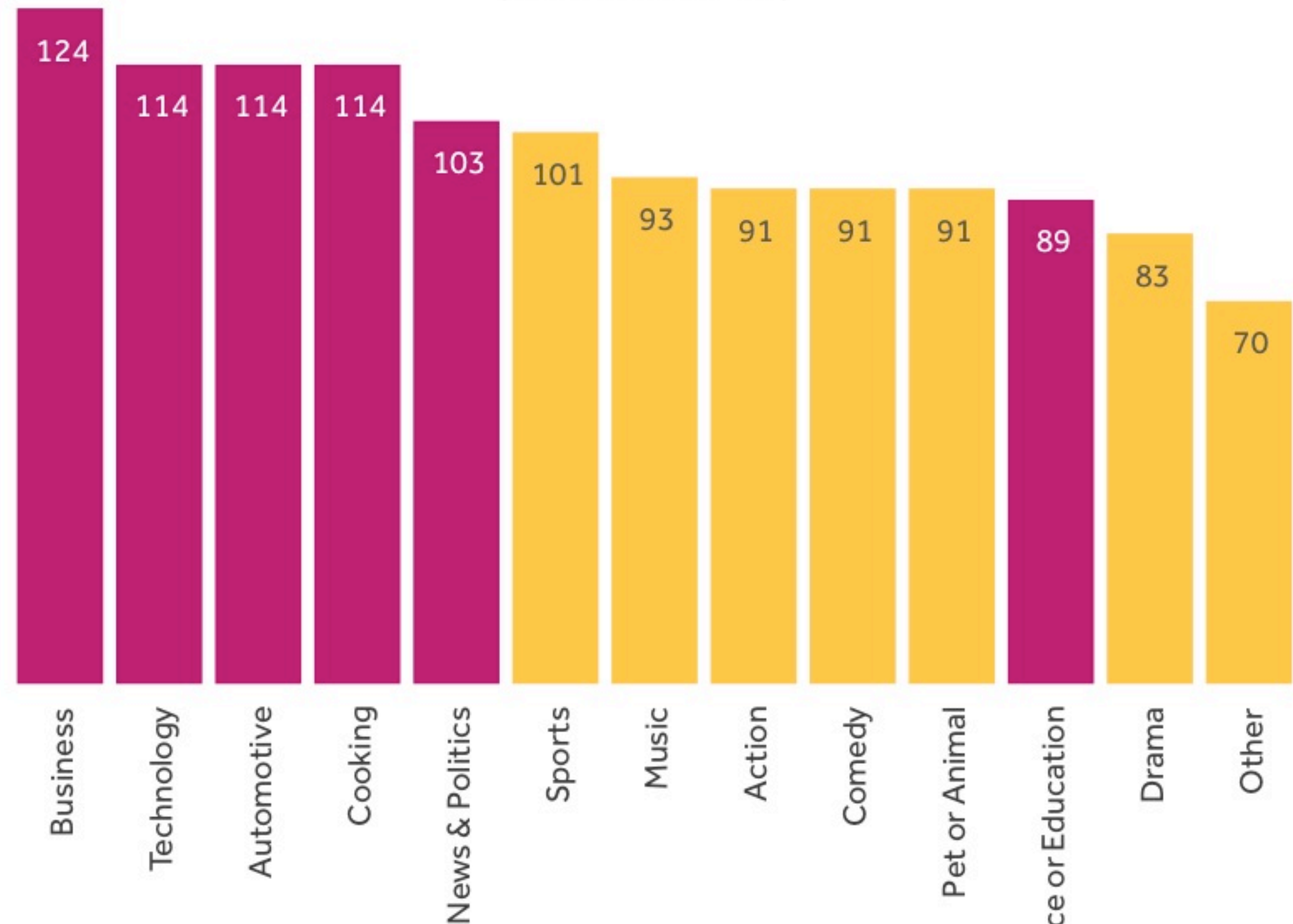
Viewers are most receptive when seeking practical content



Overall Receptivity*



Indexed Receptivity By Content Genre* (TOTAL SAMPLE)

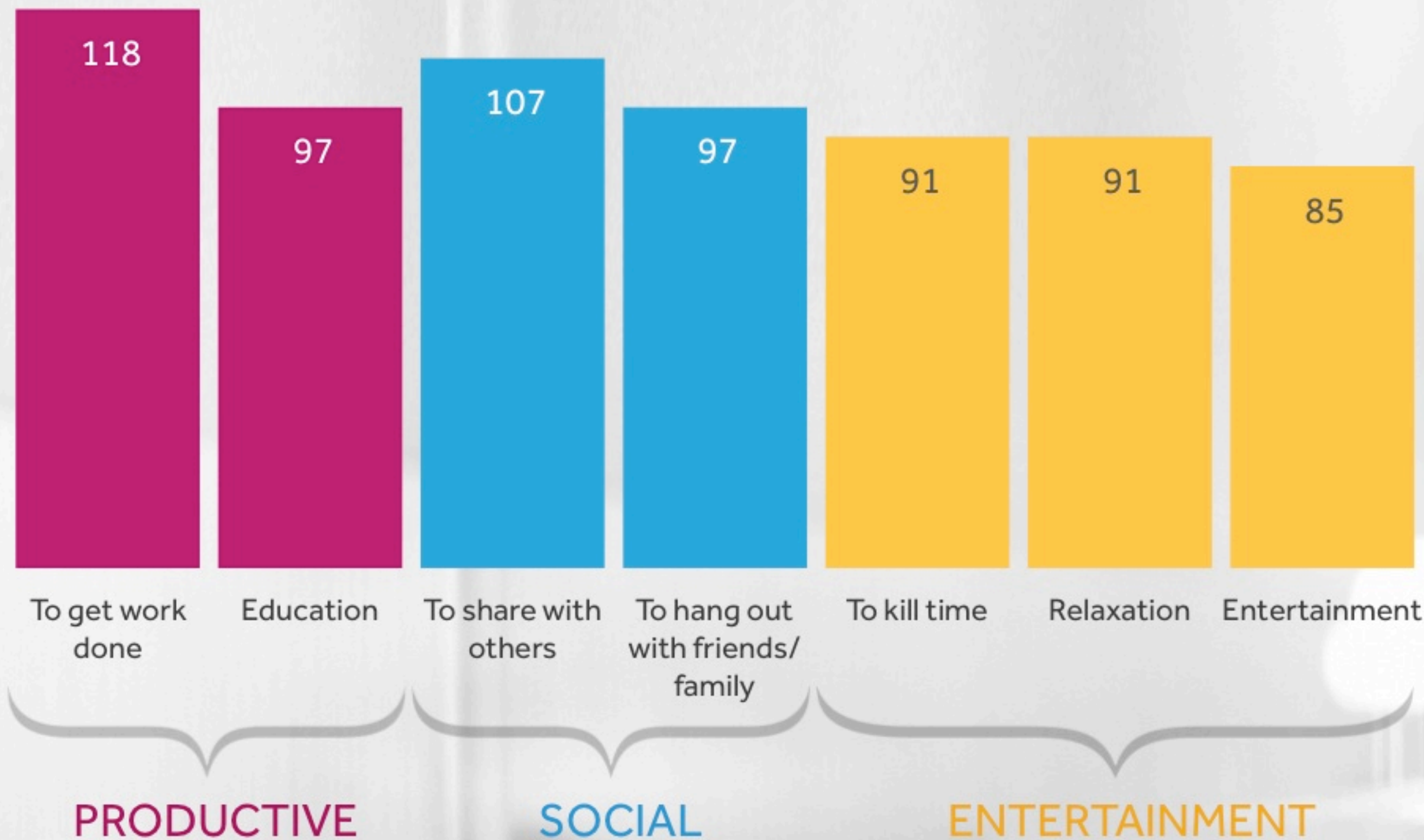


Business n=185, Technology n=292, Automotive n=140, Cooking n=297, News & Politics n=762, Sports n=740, Music n=830, Action n=1,369, Comedy n=3,052, Pet or Animal n=316, Science or Education n=537, Drama n=3,473, Other n=1,621. *Indexed so average importance is 100

Lean-back is no longer the de-facto state for ad receptivity



Receptivity By Need State



Question: What best describes why you were watching <name of show/video> from <time video was watched>?
To get work done n=335; To share n=467; Education n=669; To hang out with friends/family n=776; To kill time n=1,427; Relaxation n=4,057; Entertainment n=5,425



Good mood translates into willingness to see ads



Indexed Receptivity By Mood*
(TOTAL SAMPLE)

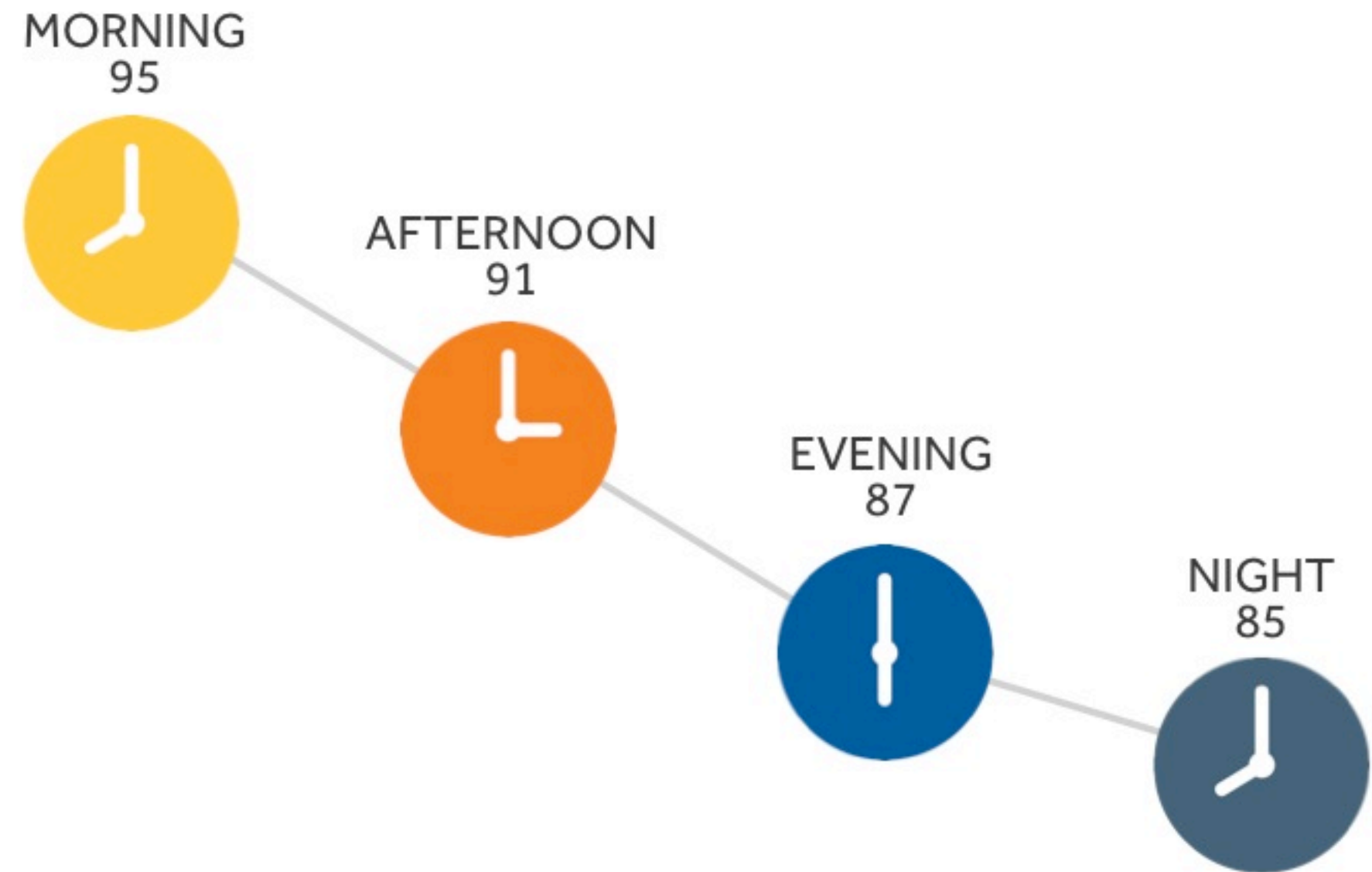


Excited n=1,188; Happy n=2,304; Focused n=1,255; Stressed n=386; Relaxed n=5,603; Bored n=908; Tired n=1,564; I don't remember n=275; None of the above n=131. *Indexed so average importance is 100

Starting off the day with a receptive mind



Receptivity By Time of Day
(TOTAL SAMPLE)



ATTENTION

Getting to the Center of It All



How to measure ATTENTION?

ATTENTION TEST

Aggregate score calculated based on answers to attention questions

- Unaided Recall
- Aided Recall
- Message Recall
- Easy Attention Question
- Hard Attention

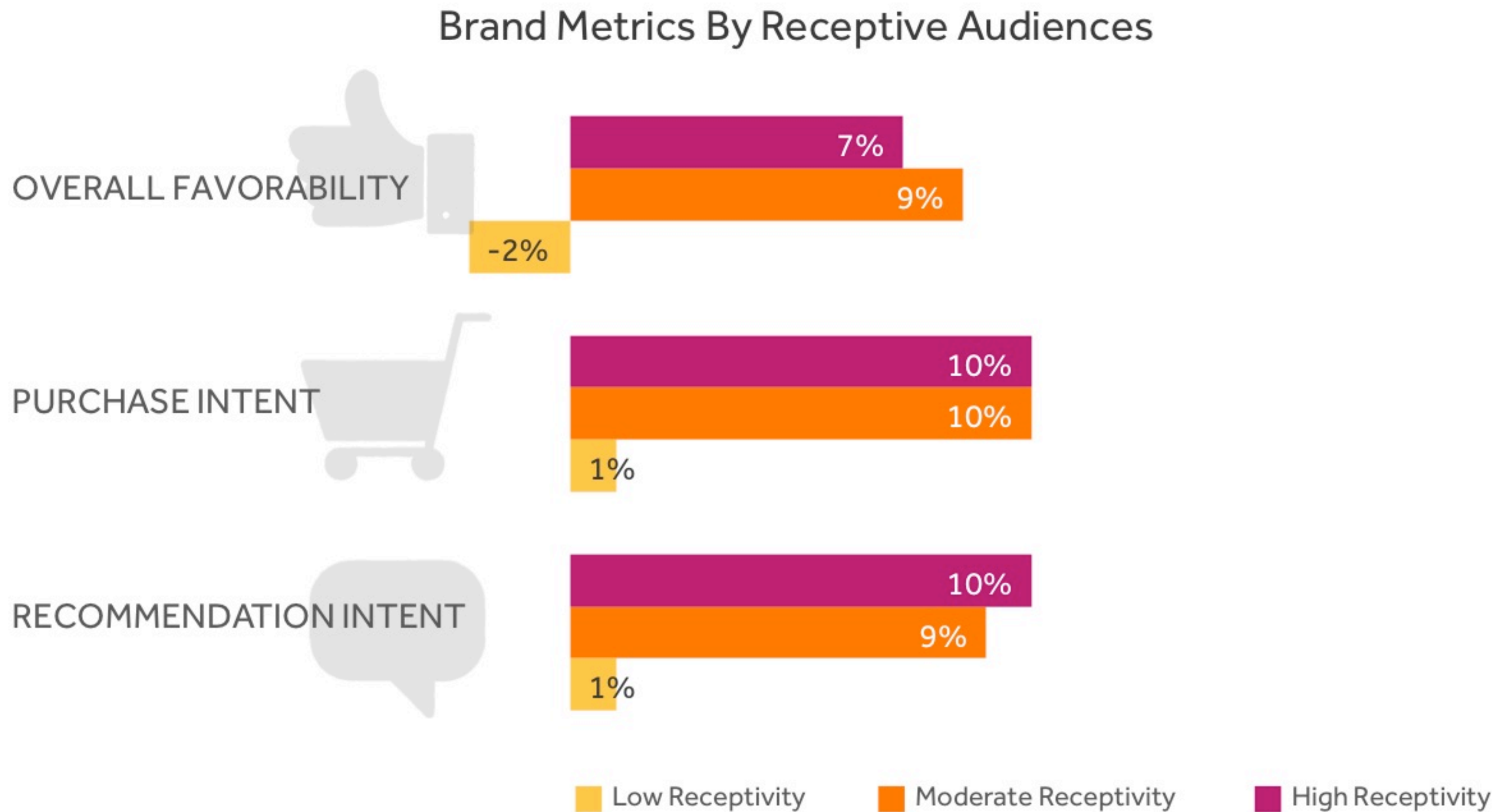


ATTENTION

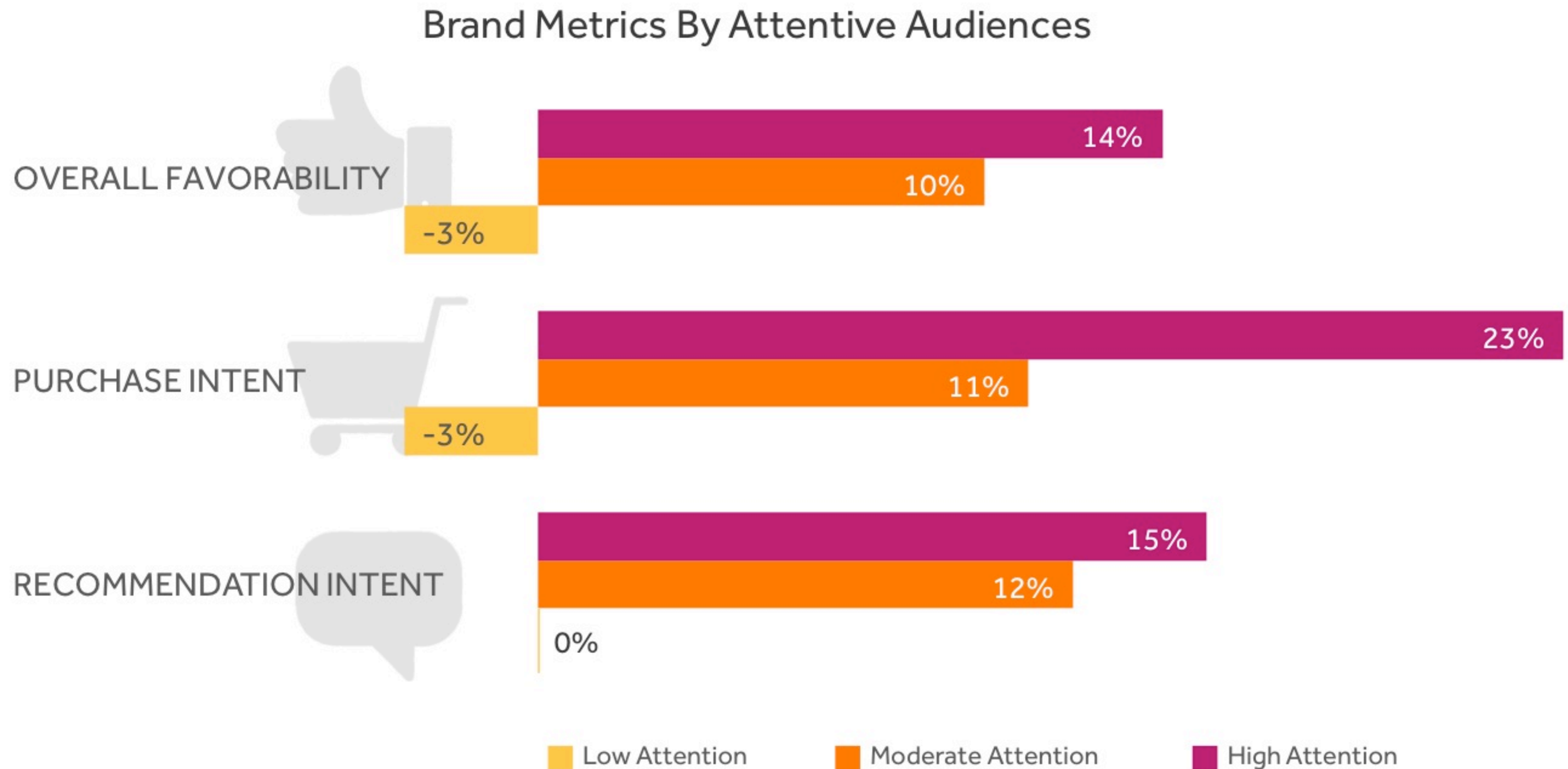
How does it affect Brand Metrics?



Benefits of higher receptivity reflected in brand metrics



Higher attention = higher brand metrics



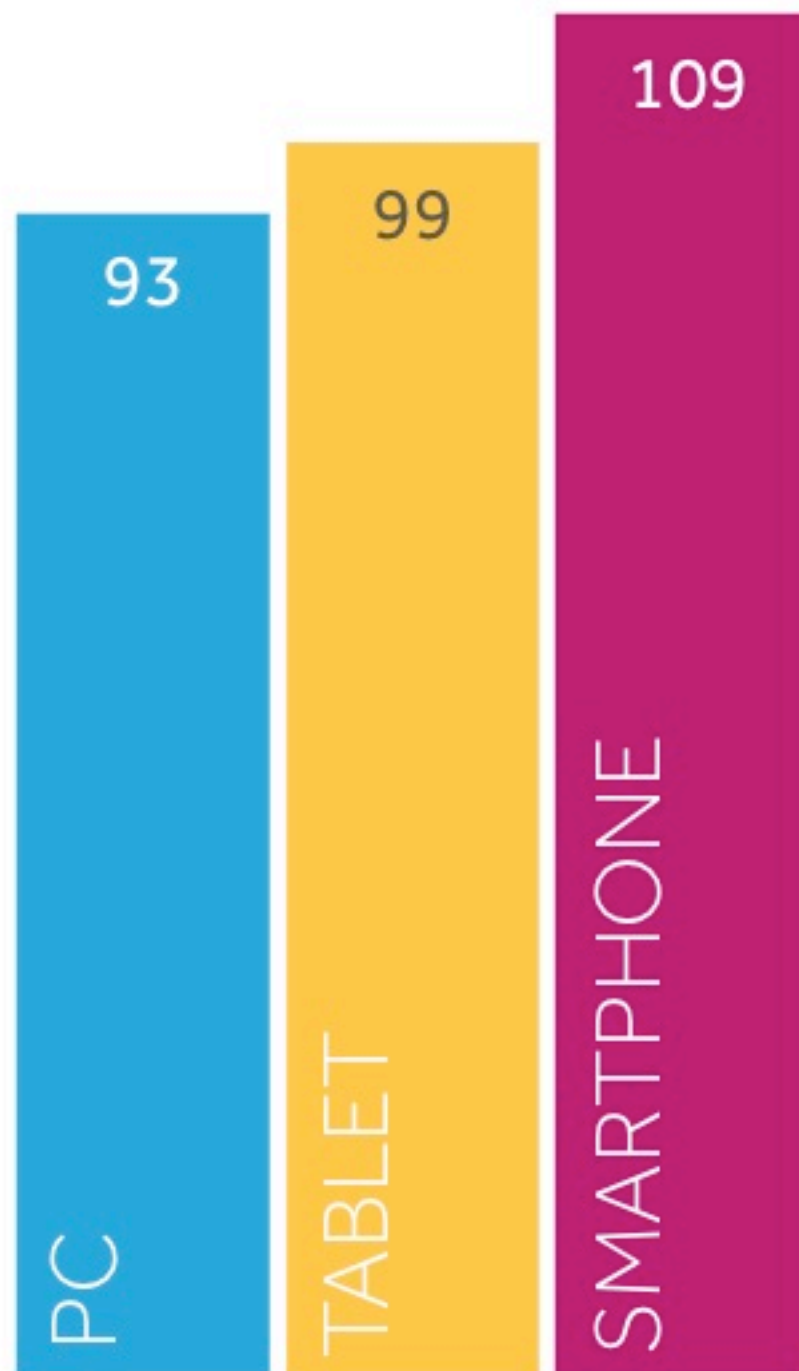
Device is a more important indicator for attention

Average Importance of Indicators



Mobile devices offer key to high attention

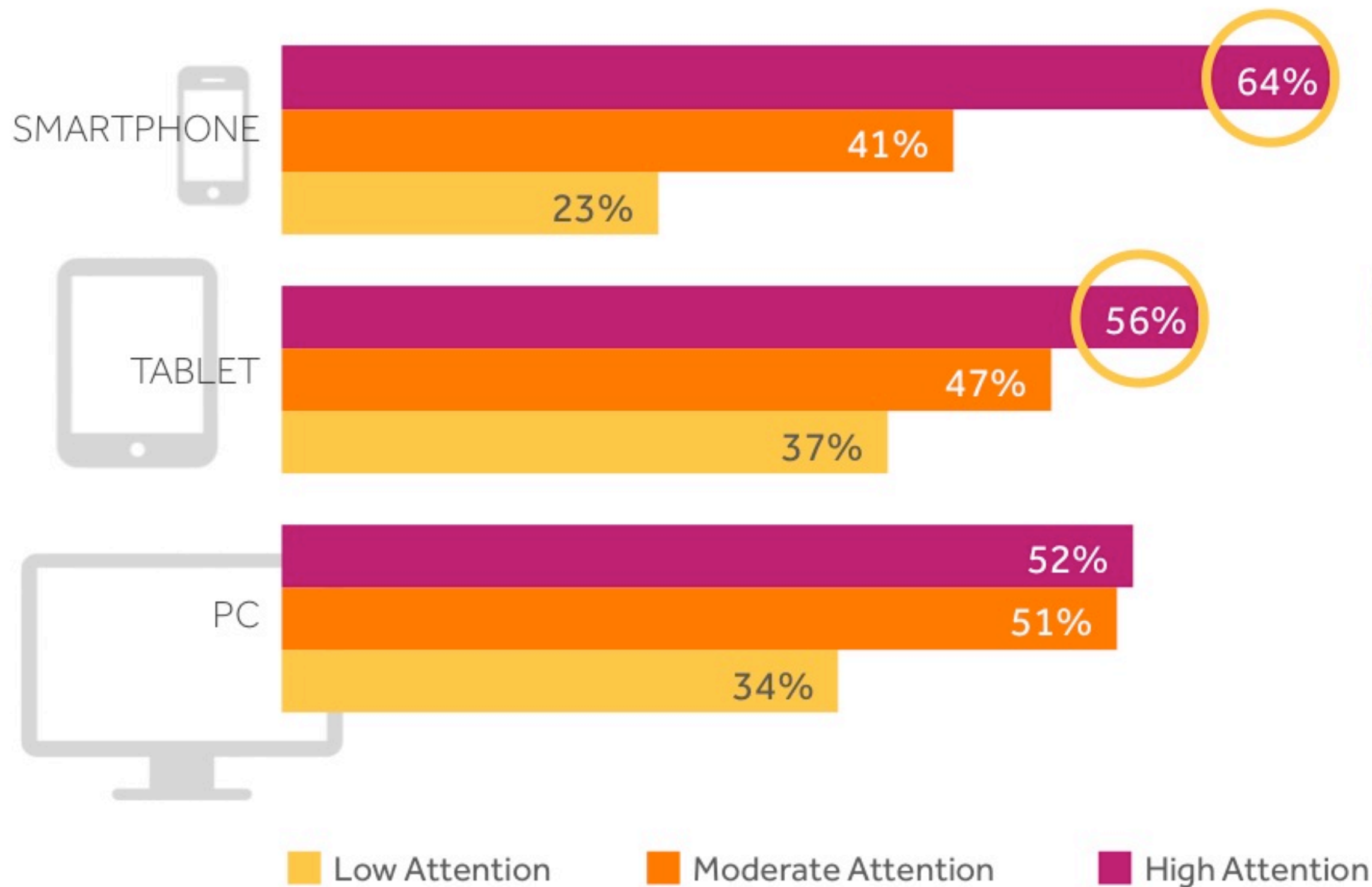
Influence of Device on Attention*



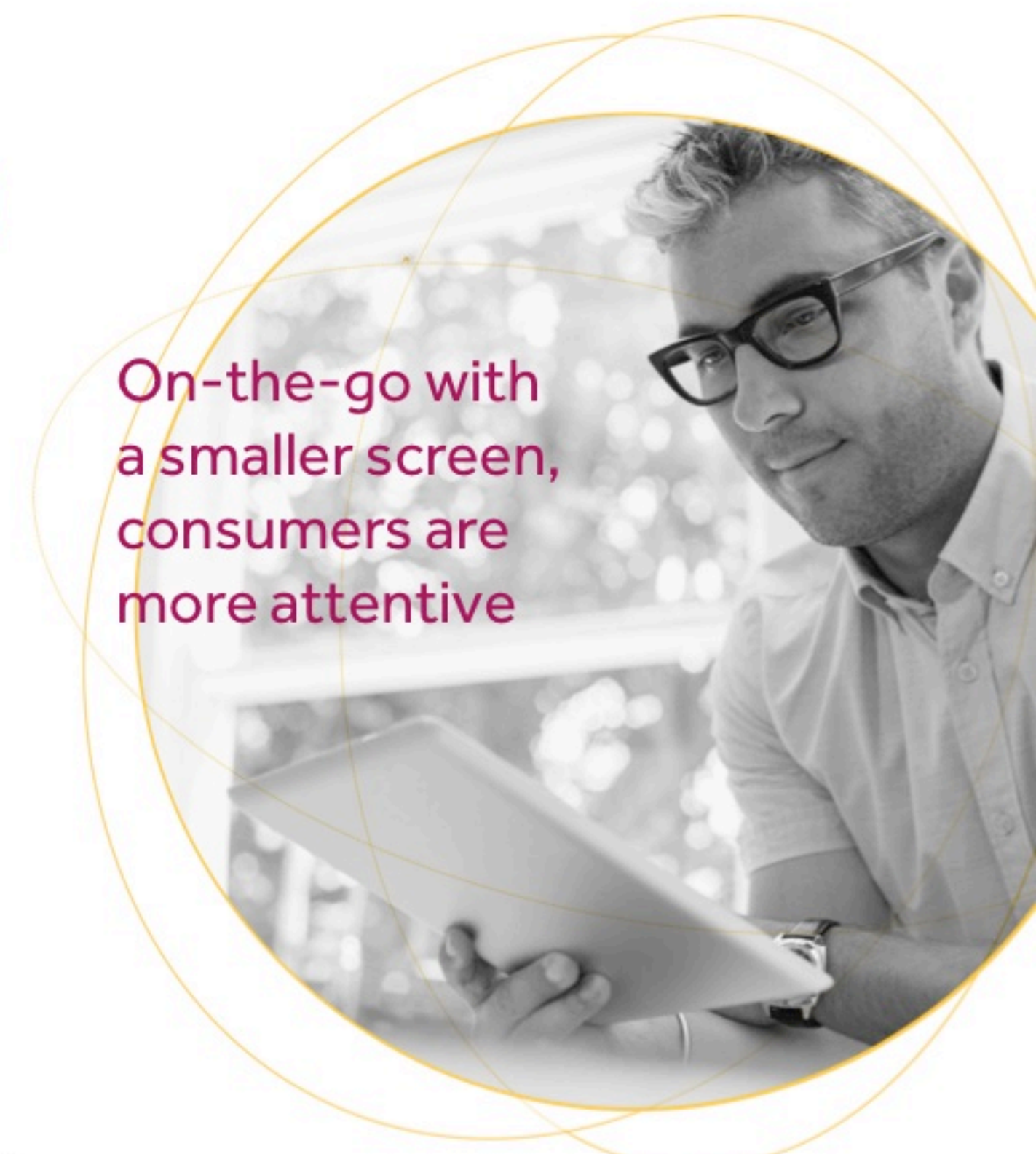
Receptivity: PC n=7,637, Tablet n=1,118, Smartphone n=1,057.
Attention: PC n=1,402, Tablet n=1,055, Smartphone n=694. *Indexed so average importance is 100

High attention on mobile provides large boost in purchase intent

Purchase Intent By Attentive Audiences



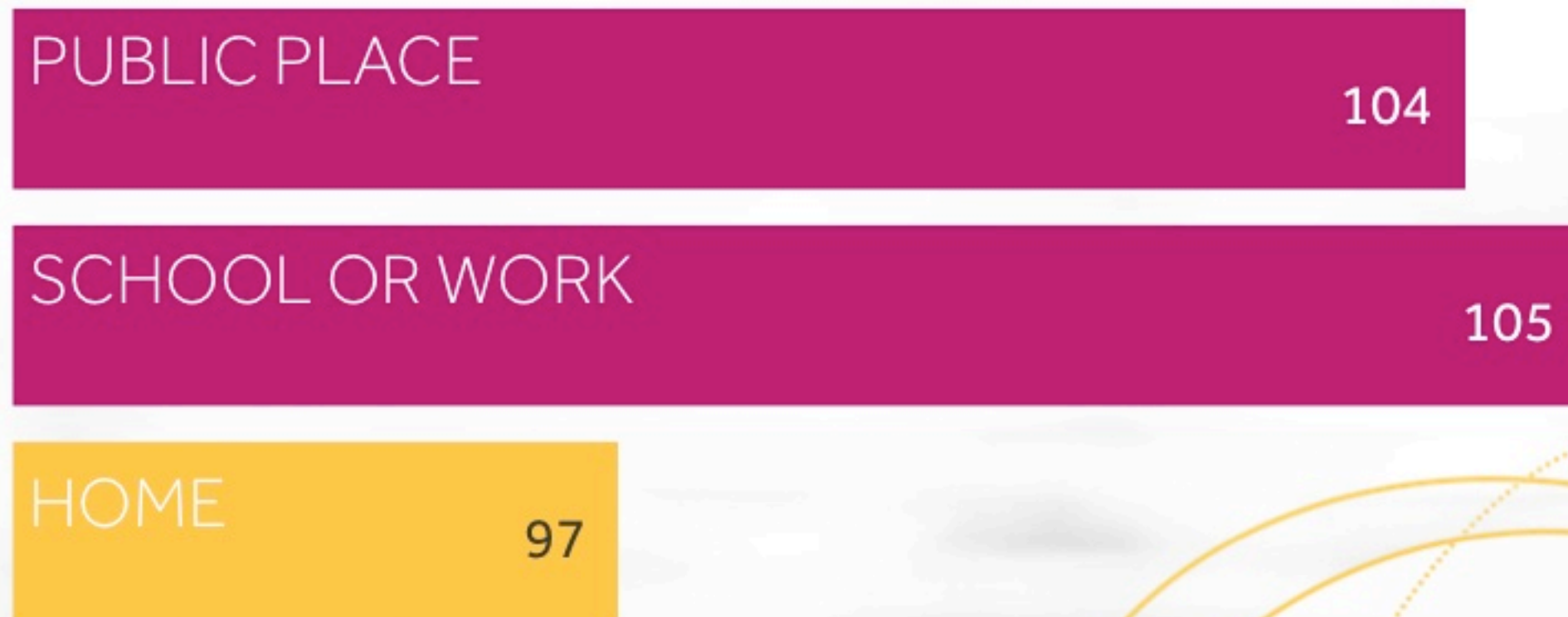
On-the-go with a smaller screen, consumers are more attentive



Being away from home is highly impactful

Indexed Attention by Location*

(TOTAL SAMPLE)

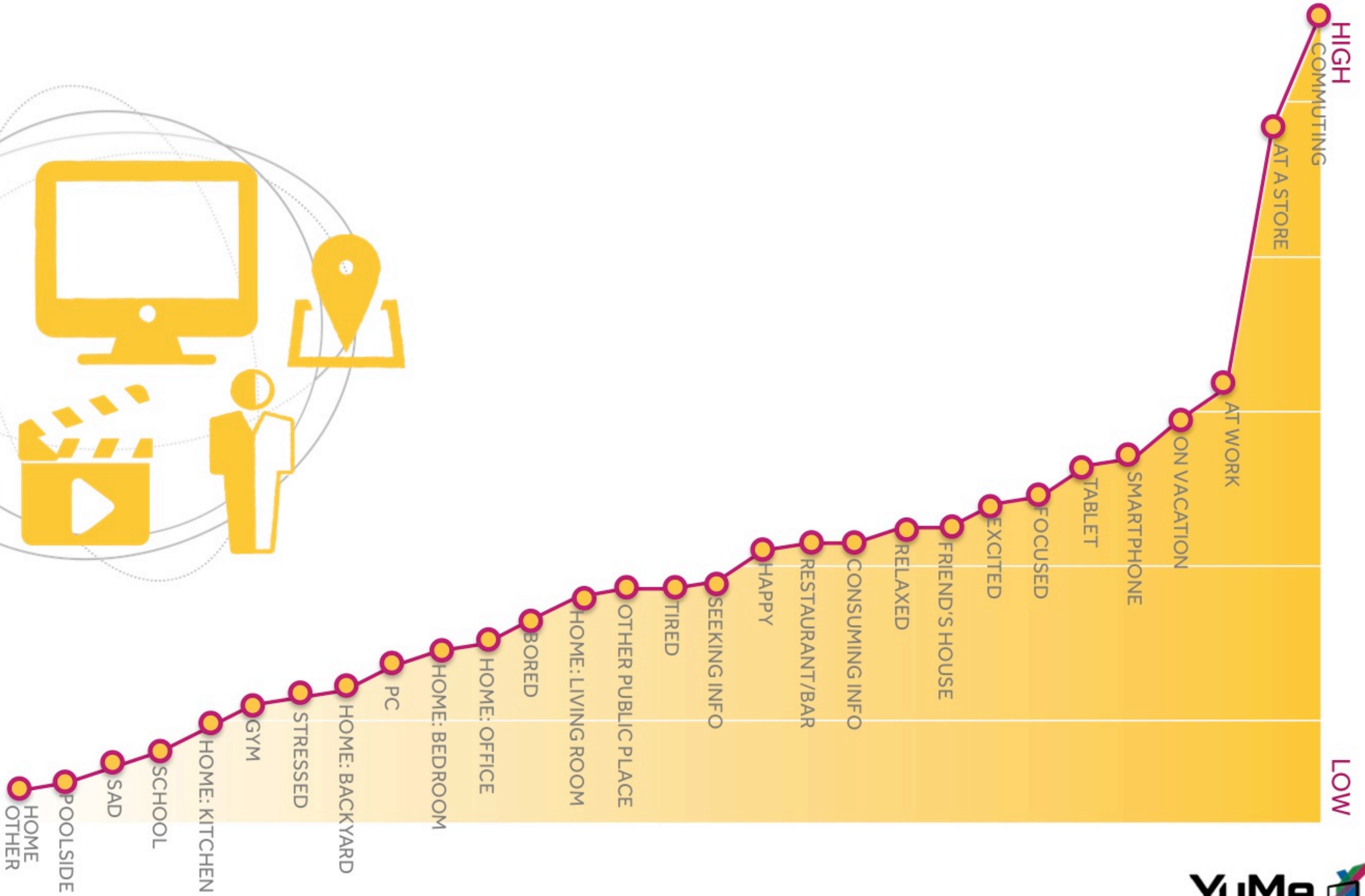


Consumers are generally more attentive in busier environments where there are lots of stimuli



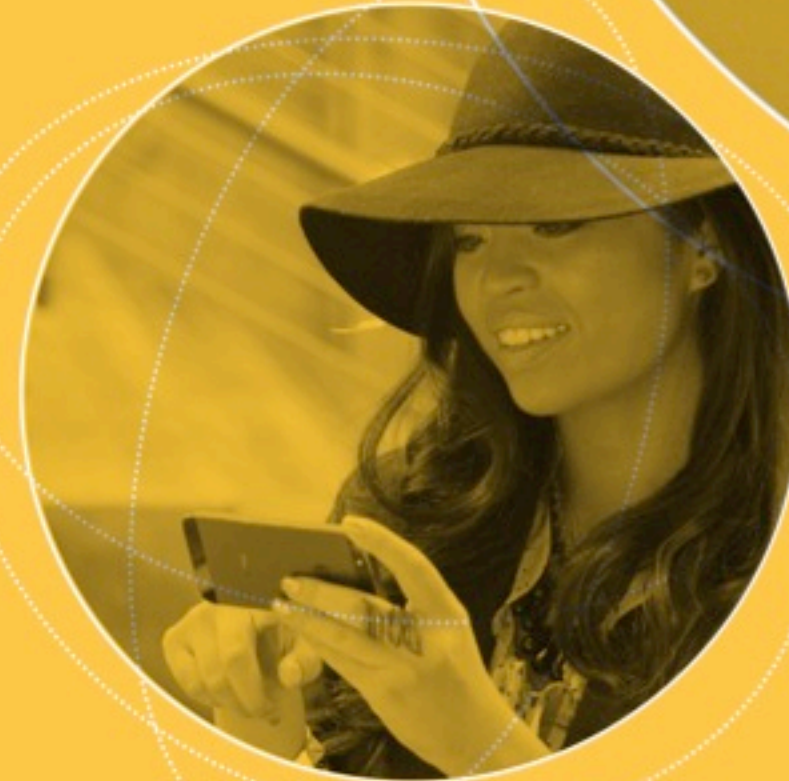
Receptivity: Public Place n=525; School or work n=801; Home n=11,630;
Attention: Home n=2702, Public Place n=137, School/work n=330.
*Indexed so average importance is 100

Attention Indexed

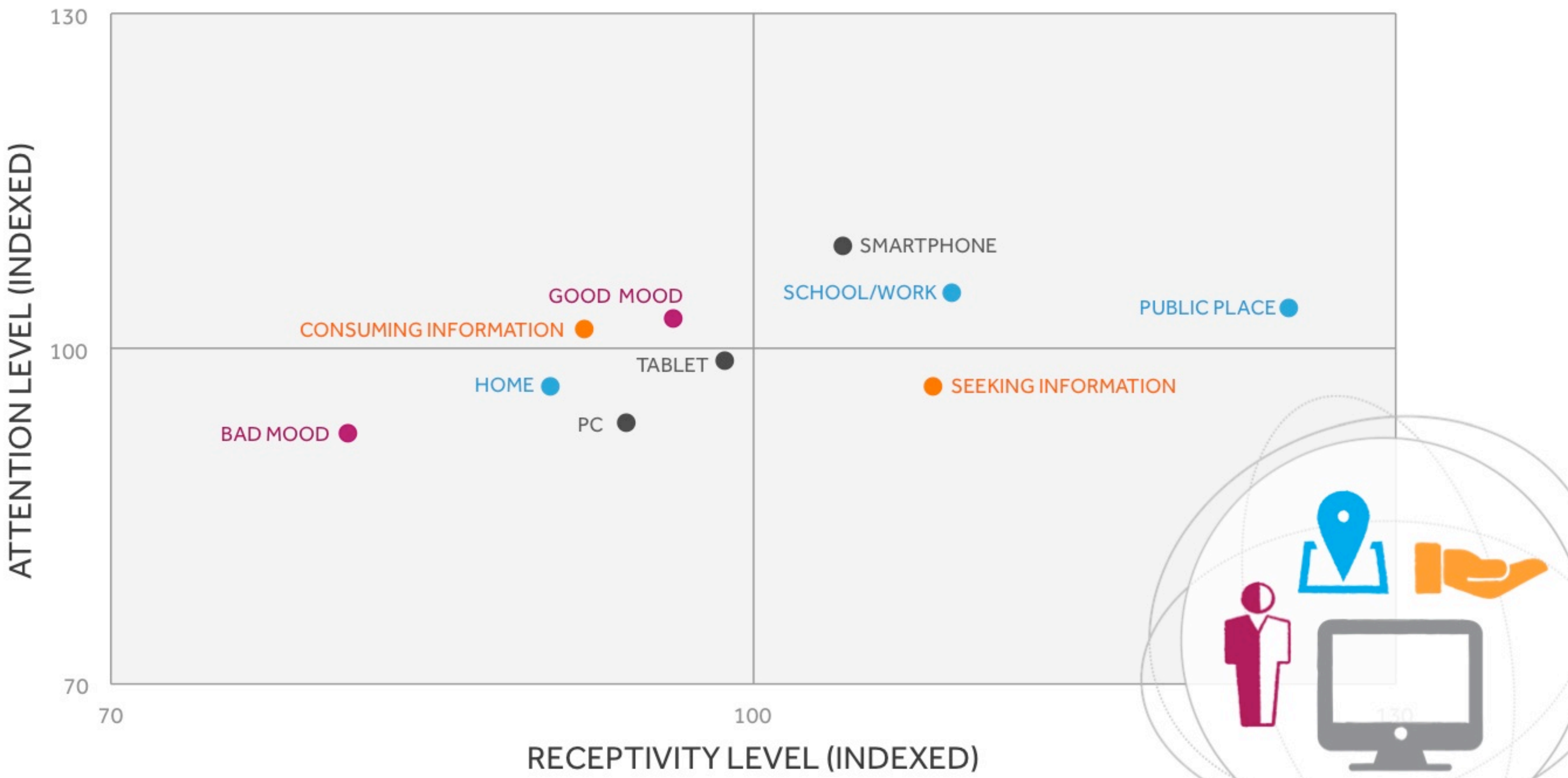


THE SWEET SPOT

Receptivity and Attention in Practice



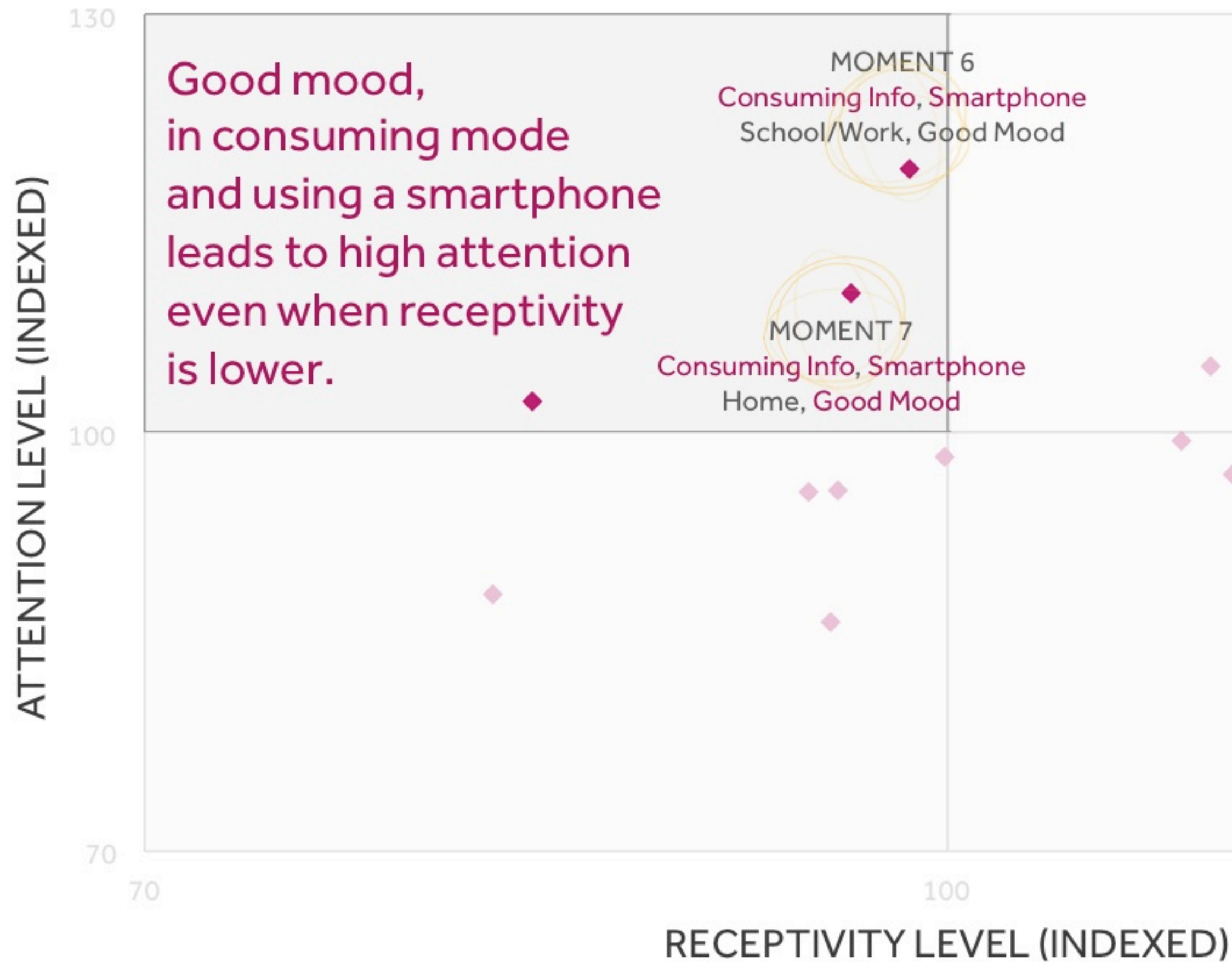
Mapping the triggers of receptivity & attention



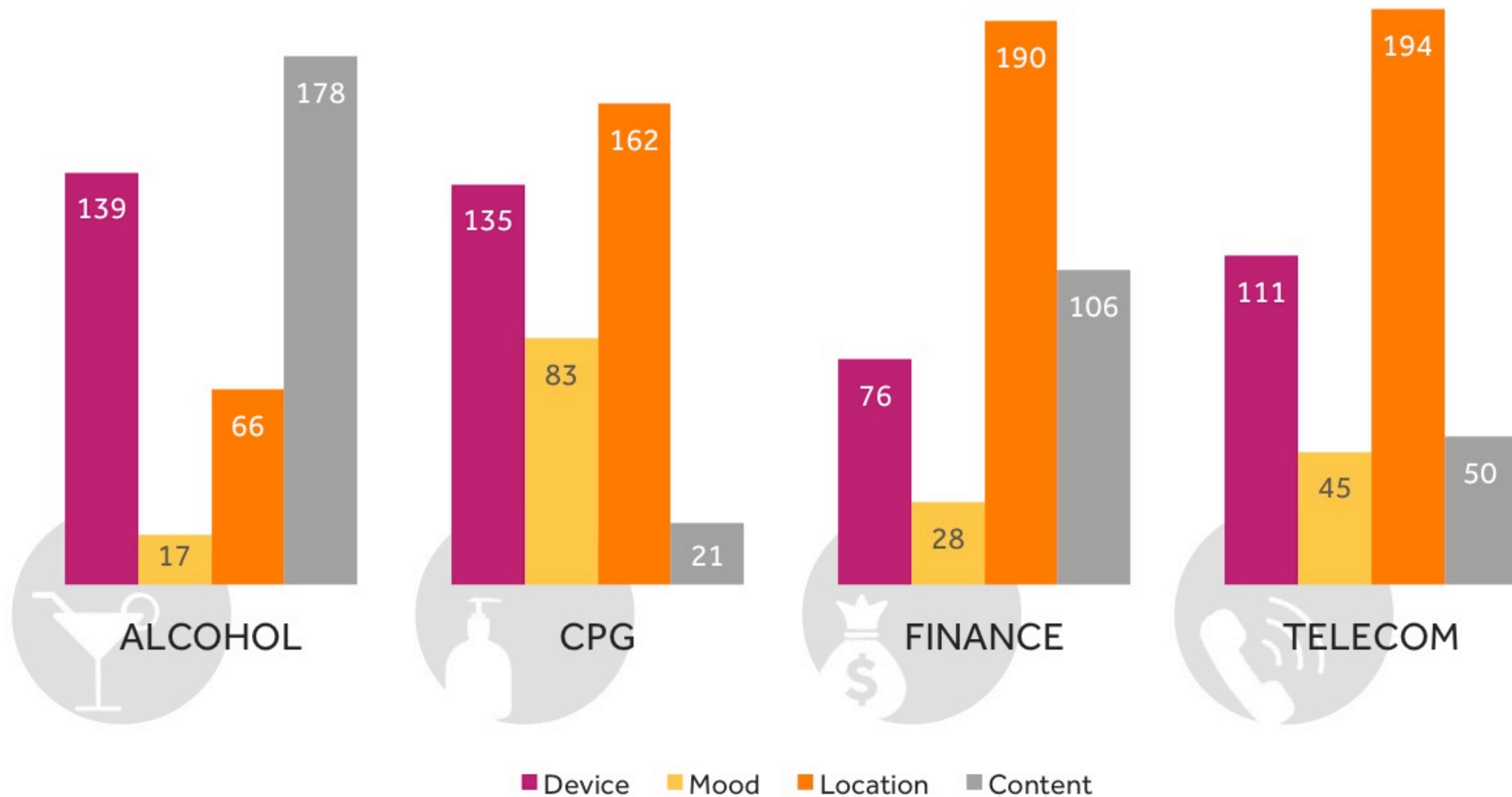
Identifying the sweet spot by moment



Identifying the sweet spot by moment



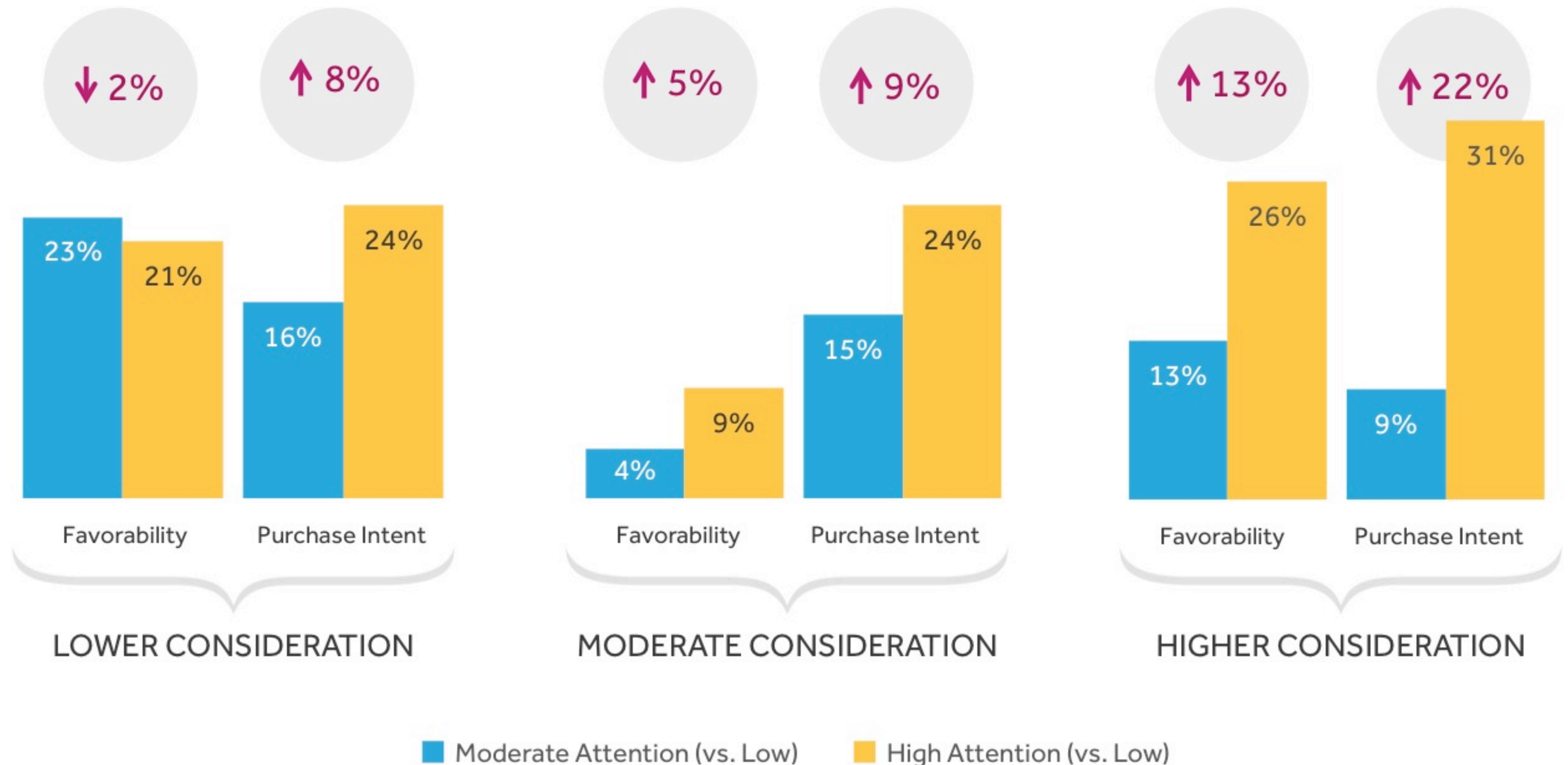
Importance of indicator for attention varies by product category



Higher attention = greater purchase intent


Brand Metrics by Attention

ADDITIONAL LIFT FROM MEDIUM TO HIGH ATTENTION



Pursuit of Attention

TAKEAWAYS



RECEPTIVITY
and ATTENTION
are drivers of
brand performance.



It's not one size fits all.
Receptivity and
attention have
complex influencers
that differ across
verticals.



Industry should
move towards recognizing
ATTENTION
as a
VALUABLE METRIC
for defining and reaching
audiences.



MOBILE consumers
provide new
opportunities for driving
brand performance.
Think beyond lean-back
and think ATTENTIVE
audiences.

Pursuit of Attention

GETTING TO THE CENTER OF ATTENTIVE AUDIENCES

